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See-through

Joel Fleishman is a sometimes controversial, always creative, faculty member at Duke University. He is making waves through his work with a foundation-research program at Duke and the recent publication of his book, *The Foundation: A Great American Secret—How Private Wealth is Changing the World*.

As the title suggests, much of what concerns Mr. Fleishman are foundations that operate secretly. His view is that the tax deductibility of gifts should require some degree of public accountability and transparency, regardless of whether a foundation is public or private. And, he thinks the successes and failures of foundations are so important to society that they should be shouted from the rooftops. His unique background gives him a broad perspective. Mr. Fleishman has raised a lot of money for charity and served as a private foundation head and board member, combined with the diversity of serving as a public official, teaching college students, and even writing a wine column for *Vanity Fair*.

He has a point. The ability of Communities Foundation of Texas to be effective relates to how well we are understood and trusted. That can only happen with a willingness to be open and transparent. Being a public foundation requires a certain level of transparency. Genuine openness about how we work with nonprofit organizations, whether in collaboration with donors or on our

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CFT Welcomes Five Community Leaders to Board of Trustees.

Additions bring wealth of community and business experience

Communities Foundation of Texas began the new year with the election of five Dallas business and civic leaders to the foundation's board of trustees: Becky Bright, Frederick B. Hegi Jr., Harold Montgomery, Frank Risch and Terdema L. Ussery II. CFT's trustees have wide-ranging knowledge of community needs, philanthropic perspective and fiscal responsibility experience. They act as stewards for

more than 800 charitable funds and exercise the final authority regarding foundation investments and charitable grants. The terms of the new trustees began Jan. 1.

"We welcome these outstanding citizens and the depth of experience and talent they bring to Communities Foundation of Texas," said Charles J. Wylly Jr., chairman of the board of trustees. "Our donors can have confidence in them. And, their knowledge of the non-profit community and the needs of North Texans will enhance CFT's ability to improve the lives of those we serve."

The five new trustees replace three outgoing members of the board:

Milton P. Levy Jr., who served as vice chairman; Dan W. Cook III; and Philip O'B. Montgomery III. "We thank Milton, Dan and Phil for their many years of dedication and commitment to Communities Foundation of Texas," said Mr. Wylly. "During their tenure, CFT's total grants to

charitable organizations over the years have now passed the \$800 million milestone, and the assets of the foundation have grown to more than \$779 million."

Becky Bright, a longtime civic and philanthropic volunteer, is currently chairing the Senior Source \$9.8 million "Coming of Age" campaign. She has held numerous leadership positions with the United Way of Metropolitan Dallas, including board chair and chair of the allocations committee. A sustaining member of the Junior League of Dallas, Ms. Bright has chaired Crystal Charity Ball, the Senior Source Spirit of Generations Luncheon and

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CFT's new trustees are, from left, Becky Bright, Harold Montgomery, Frank Risch, Terdema L. Ussery II and Frederick B. Hegi Jr.

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own, takes it a step further. Sometimes we hit the ball out of the park, sometimes we don't. But, the whole story of how we play the game is worth hearing.

One of the things we resolve to do better as a foundation is opening new channels of communication with donors and sharing more information about nonprofits. Last fall, Bank of America and the Center on Philanthropy at Indiana University published a study of the giving patterns of wealthy people. While tax considerations may drive the timing of a gift, the survey showed that avoiding taxes does not motivate charitable giving. Mostly, donors give because they want to meet critical needs and give back to society. And, they said they would give more if they could better determine the impact of their gifts and had more information about nonprofits.

What does this mean to CFT? If we're really going to "bring visionary philanthropists and worthy causes together," we first have to be operated well and in a manner that enables people to trust us. Second, we also have to be a conduit. We have to support the flow of information to donors about nonprofit organizations so that more people will understand what they can do in tandem with those nonprofits to improve our society.

Fortunately, CFT has talented staff and dedicated board members who endorse these principles. The role of the board is especially critical. With deep gratitude, we thank Dan Cook, Milton Levy and Phil Montgomery for their stellar leadership through board service that concluded at the end of 2006. And, we are enthusiastic to announce the election of five new board members who will lend their considerable talents and strengths to the foundation: Becky Bright, Fred Hegi, Harold Montgomery, Frank Risch and Terdema (Go Mavs!) Ussery. You can read more about them on this and the preceding page.

All of us at CFT are committed to doing our best, keeping your trust and moving the needle forward in our community. If you have any questions, just ask.

Brent

Brent E. Christopher
President and Chief Executive Officer

CFT Cites Three Trustees For Years of Dedication.

Continued from page 1

Baylor Health Care System Foundation's Caring for Generations campaign, and served on the board of directors of the Center for Nonprofit Management. She is a graduate of Southern Methodist University.

Frederick B. Hegi Jr., is a founding partner of Wingate Partners, a Dallas-based private investment firm, and chairman of United Stationers. Previously, he was chairman of Loomis, Fargo & Co. and Kevco, Inc. Mr. Hegi also is a member of several corporate boards of directors. He is an advisory director and former chairman of the Interfaith Housing Coalition and a trustee of SMU, the Dallas Center for the Performing Arts Foundation, Southwestern Medical Foundation, University of Texas Chancellors Executive Council, First Presbyterian Foundation and Woodall Rogers Park Board. Mr. Hegi holds degrees from SMU, Harvard Business School and UT.

Harold Montgomery is chairman and CEO of ART Holdings, Inc., a retail payments processing company serving stores nationwide. He served as president of the Dallas Committee on Foreign Relations from 2001 to 2004 and is a past president of Young Audiences of Greater Dallas, now known as Big Thought. Mr. Montgomery is active in Young Presidents' Organization and served on the organizing committees for four International Presidents Universities, week-long conferences for membership education. He is a member of the Council on Foreign Relations (New York) and holds BA and MBA degrees from Stanford University.

Frank Risch retired from ExxonMobil Corp. in 2004 as vice president and treasurer after a 38-year career with the corporation. He serves in leadership roles with the Dallas Theater Center and Dallas CASA (Court Appointed Special Advocates) and is president of Temple Emanu-El. Mr. Risch also is a member of

tives Institute, the World Affairs Council of Dallas/Fort Worth and the Dallas Committee on Foreign Relations. He earned degrees from Pennsylvania State University and Carnegie Mellon University.

Terdema L. Ussery II is president and CEO of the Dallas Mavericks and CEO of HDNet. Before coming to Dallas, he served as president of Nike Sports Management and commissioner of the Continental Basketball Association. Mr. Ussery is a member of the advisory board for the Salvation Army and the board of trustees of Princeton University. He earned a bachelor's degree from Princeton, and also holds degrees from Harvard's John F. Kennedy School of Government and the University of California at Berkeley Boalt Hall School of Law.

In addition to Mr. Wyly, other trustees continuing their service on the CFT board are Joseph M. (Jody) Grant, vice chairman; Linda Pitts Custard, secretary; Jere W. Thompson, treasurer; Jack M. Kinnebrew; Linda Brack McFarland; Lydia Haggard Novakov; Gifford Touchstone; and Joel T. Williams III. Ruth Collins Sharp Altshuler is an ex-officio member of the board and immediate past chairman.

"All of us at Communities Foundation of Texas are grateful for the strength of our board, and we look forward to working with this excellent slate of new trustees," said Mr. Christopher. "As we continue a tradition of service and pursue fresh initiatives to strengthen our relationships with donors and nonprofit organizations, their leadership will be invaluable." 🙌



During the November 2006 board meeting, CFT thanked outgoing trustees, from left, Milton Levy, Phil Montgomery and Dan Cook. Since they joined the board in 1994, the foundation's assets grew from \$263 million to nearly \$780 million, and yearly grantmaking increased from \$20 million to almost \$69 million.

Photograph by Steve Foxall

Worthy of Consideration.

Chances to give; recommended CFT grant requests that weren't funded

Communities Foundation of Texas receives many grant requests that are worthy of support, but limited discretionary funds make it impossible for trustees to approve all of these requests.

CFT encourages donors and fund advisors to consider the following worthwhile grant requests that could not be funded at the November meeting of the Grants Distribution Committee:

Collin County Historical Society requested \$50,000 to assist in the transformation of the Collin County Farm Museum's Wells Building from an unheated storage building to an environmentally controlled programming and exhibition space.

Dallas Children's Advocacy Center sought \$20,000 to purchase technology upgrades, including a new computer network server for software applications, a new system for improved backup capabilities and software updates. The Dallas Children's Advocacy Center

partners with public and private agencies to break the cycle of abuse through collaborative intervention in a child-sensitive environment.

Dallas Coalition of HIV/AIDS Services Fund of The Dallas Foundation asked for \$100,000 to bridge a funding gap created by reduced federal funding for support services for individuals and their families living with HIV/AIDS. The Coalition is composed of four nonprofit organizations serving individuals in Dallas County, including AIDS Interfaith Network, AIDS Services of Dallas, Dallas Legal Hospice and Legacy Counseling Center.

Human Rights Initiative of North Texas requested \$50,000 toward the overall project cost of \$229,000 to fund a collaborative research study between the Human Rights Initiative (HRI) and the University of Texas at Dallas. The purpose of the study is to investigate the data collected by HRI and how it relates to public policy decisions regarding asylum.

St. Vincent de Paul Thrift Store of Dallas applied for \$400,000 toward a campaign goal of \$4 million to buy, renovate, open and operate a 26,862-square-foot facility in Northwest Dallas debt-free. The facility will provide donated household items, clothing and furniture at low

or no cost to poor, lower-income or financially troubled individuals and families in Dallas.

Volunteer Center of North Texas sought \$162,200 over three years to educate agencies and faith-based organizations about the importance of adequate background checks for employees and volunteers. The center provides volunteers and important infrastructure services related to volunteerism to more than 1,800 nonprofit organizations throughout Collin, Dallas and Tarrant counties.

White Rock Boathouse, Inc., asked for \$500,000 toward a capital budget of \$2 million to renovate and convert a facility on the White Rock dam into a boathouse with classroom and community facilities. The facilities will be used by Row Dallas, an initiative being launched by White Rock Boathouse to teach rowing skills to inner-city high school girls. The initiative is intended to enhance academic prospects through greater opportunities for admission and scholarships to colleges and universities with rowing programs.

For more information about any of the funding requests in this section as you consider your own grant recommendations, please contact the CFT grants department at (214) 750-4222. 🍂

AFP Presents 21st Annual Event Honoring Outstanding Dallas Philanthropists

Communities Foundation of Texas joined the Association of Fundraising Professionals Greater Dallas Chapter in recognizing top area philanthropists recently at the National Philanthropy Day 21st Annual Awards Luncheon.

Nancy Dedman and T. Boone Pickens received awards as Outstanding Philanthropists. Among other honorees were Carole V. Rylander, Outstanding Fundraising Executive; IBM Corporation, Outstanding Corporation; The

Summerlee Foundation, Outstanding Foundation; Sandra Estess, Outstanding Volunteer Fundraiser.

Nonprofits large and small received special recognition for responding to the needs of Hurricane Katrina evacuees.

Other sponsors of the awards luncheon included Brigham Hill Consultancy, *The Dallas Morning News*, Dini Partners, Strasburger & Price, LLP and Washington Mutual. 🍂

Photograph by Kristina Bowman



CFT President and CEO Brent Christopher with Nancy Dedman, honored as an Outstanding Philanthropist.

Giving is Browning Family Affair.

Three generations continue philanthropy with donor-advised funds

Jane Browning's close-knit family lives mostly in Dallas. Jane, her three daughters, sons-in-law and grandchildren see each other often and vacation together yearly. Her eight grandchildren spend so much time together, Jane says, "They're really more like siblings than cousins."

And when it comes to philanthropy, Browning family members also work together, giving both time and resources to causes that are important to them. This legacy of family philanthropy follows in the footsteps of Hattie Louise Browning, the mother of Jane's late husband, William "Bill" Browning Jr. Bill was the founder of Browning Oil Company.

When Hattie, nicknamed "Beau" by her grandchildren, passed away in 1974, her estate created a fund at Communities Foundation of Texas. Over the years, grants from the Hattie Louise Browning Fund have benefited a number of charities, including Northwood University, Salvation Army, SPCA and In-Sync Exotics, a wildlife refuge in Wylie.

Just as they spend time together as a family, Jane and her daughters, Kathryn, Averille and Fallon, share in decisions on what charities to support – a tradition that began early. And while Jane's sons, Will and Bob, are now deceased, they were instrumental in getting the family involved in giving of their time as well as their money. Will "absolutely loved giving," Jane said, and the family fondly remembers trips with him to buy toys for the Santa Cop program and visits with the grandchildren to Happy Hill Farm.

"With a fund at CFT, family members can be highly involved in philanthropy without the burdensome requirements and additional expenses of a private foundation."

Two years ago, Jane Browning established the Jane and Bill Browning Family Fund at CFT. The donor-advised fund was designed so her three daughters and their children will

Hattie Louise Browning's estate established the family's first donor-advised fund at CFT. Continuing her legacy are Jane Browning (second from right) and daughters, from left, Averille, Kathryn and Fallon.



continue the family's philanthropy for many years. Jane considered establishing her own charitable foundation, but the family's advisor,

Robert Don Collier, suggested she establish a fund at CFT instead. "CFT was such a great alternative," she said. "They worked closely with me to establish the donor-advised fund that addressed my desire to continue our family's charitable giving. I wanted to leave future philanthropic options to my children upon my death, and the Jane and Bill Browning Family Fund was the ideal way to accomplish my goals."

Donor-advised funds are perfect for a family like the Brownings, said Mr. Collier. "With a fund at CFT, family members can be highly involved in philanthropy without the burdensome administrative requirements and additional expenses of a private foundation."

Jane enjoys the opportunity to discuss her philanthropy with her daughters, Kathryn, Averille and Fallon. In turn, they look forward to participating in the family's charitable legacy for many years to come through the family's donor-advised funds. "We want the next generation to have an impact on philanthropy," said Averille. "It's really important to us to have the family involved." 🌸

CFT does not provide legal or tax advice and advises you to seek your own legal and tax advice in connection with all charitable and planning matters.

Attention: Professional Advisors



Charles W. Collier

For more details, visit www.cftexas.org, or call (214) 750-4213.

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Tuesday, May 1, 2007

8 a.m. to 11:15 a.m. at Communities Foundation of Texas



Visiting nurses improve patient care with portable computers.

Trudy Rand, a registered nurse with the Visiting Nurse Association of Texas, is enthusiastic about her electronic clipboard – a portable tablet computer she takes with her to the homes of her patients.

She enters patient data into the computer, sending it instantly to physicians and the VNA office. The device virtually eliminates paperwork and allows her more valuable time to spend with her patients.

“The electronic clipboard makes it possible for VNA nurses and other health care professionals on our team to continuously monitor and update each patient’s health data,” Ms. Rand said. “We’re able to coordinate all the services in the patient’s plan of care more efficiently so as to provide the best care possible.”

Since spring 2006, she has

been one of 140 field staff members employing Point of Care technology in their daily work with VNA’s Home Care and Hospice programs. With the help of \$175,000 in grants from Communities Foundation of Texas – \$100,000 from the Katie Foundation Fund and \$75,000 from the Tom A. Harris Fund – VNA trained 171 nurses, therapists, social workers, chaplains and other personnel in the new technology during four full-day sessions. VNA serves patients in nine counties in North Central Texas.

The Point of Care technology has improved the accuracy and speed of transmitting clinical infor-

mation and led to better patient care at less cost. For example, software on the system screens for drug interactions. During the pilot phase, the software sent a “red alert” to a nurse about a potentially fatal drug combination in her patient. “Point of Care possibly saved a life during the pilot, and we’ll never know how many other lives it will save,” said Robert P. Carpenter, president and CEO, VNA.

“It’s the new standard for the way we manage service delivery in the field and is becoming an important recruiting tool that allows us to demonstrate we are implementing industry-leading practices.”



CFT grants helped train VNA staff in new technology to update patient medical records using tablet computers during home visits.

Gift Buys System To Freeze Blood For Future Use

Ample blood supplies – always so vital to a community’s health care system – are even more critical in the event of a large trauma situation, public health crisis or natural disaster. Carter BloodCare, which serves 31 North Texas counties, now can better safeguard the health of millions, with the assistance of a \$96,000 grant from a fund established by the estate of Fred Lange at Communities Foundation of Texas.

The grant enabled the purchase of two Haemonetics ACP®215 systems used to freeze red blood cells in a new process that will help Carter BloodCare build and maintain inventories of group O blood supply (universal donors) and rare blood types.

While red blood cells can be frozen and stored for up to 10 years, until recently technology allowed only a 24-hour window between thawing and transfusion. The Haemonetics system, originally adopted by the military, allows a blood bank to freeze red blood cells and prolong their usable life to 14 days after thawing.

Using the new process, Carter BloodCare is able to freeze surplus group O blood and rare blood for future needs and reduce its reliance on imported supplies from other blood centers during times of shortage.

“With many major metropolitan areas in the United States routinely experiencing periodic blood shortages, this new technology will further safeguard our blood supply here in north central Texas,” said Stephen J. Eason, director of development for Carter BloodCare. “This enables our health care system to be sustained through dedicated volunteer blood donors in our area.”

Carter BloodCare is guided by the philosophy that community blood donations should benefit community patients, and that blood centers must be responsive to the community that supports them. The blood center is guided by a board of directors drawn from local leaders, including medical professionals, hospital administrators, business and civic leaders.

Noteworthy

HUNGRY AND HOMELESS – The Dallas Morning News Charities raised a record \$1.85 million in its 2006-2007 campaign to help the area’s hungry and homeless. CFT assists the Charities board in reviewing applications from local agencies. The campaign, which granted funds to 22 agencies, re-

ceived contributions from several donor-advised funds at CFT.

TOP WEALTH ADVISORS – Jack M. Kinnebrew, a member of CFT’s board of trustees, has been named one of America’s top 100 wealth advisors by *Citywealth* magazine, a European-based publication. The publisher surveyed wealth managers and intermediaries from around the globe to determine the ranking.

Mr. Kinnebrew, a partner with Strasburger & Price, LLP, is a fellow of the American College of Trust and Estate Counsel and past president of the Dallas Estate Planning Council.

Also in the top 100 were Vester T. Hughes Jr., Hughes & Luce, LLP, CFT’s senior tax counsel, and Michael Graham and Rust E. Reid, members of the Advisory Council.

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Photograph by Dana Driensky



Texas Talent Raises Money for Next Generation – Willie Nelson and Jessica Simpson headlined an “artclectic” mix of talent for AetheriA Foundation’s inaugural concert in February to benefit arts education. The event at Nokia Theatre raised money for a fund at Communities Foundation of Texas that will grant college scholarships to students majoring in the visual and performing arts. Also appearing at the concert were Morgan Fairchild, Kinky Friedman, Larry Hagman, Amanda Dunbar, Cirque du Soleil, Dallas Black Dance Theatre, the Fort Worth Symphony Orchestra and the Living Opera. 🍷

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